



RFx - Response Submission Process Supplier Guide

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You have received an invitation to participate in an RFx

How are you notified?

When a buyer invites a supplier to participate in a request for quote/proposal, an email notification is sent to the supplier contacts selected by the buyer.

In addition, on the selected contacts' home page, a new entry will be queued in the *Client Requests for Quote/Proposal* frame.

Client Requests for Quote/Proposal ▾												
Prop. progress	Sourcing process	Lot#	Round#	Round	RFx status	Remaining time	Begin (your local time)	End (your local time)	My bid	My rank	Best bid	Forum
NDA to send	BPM000171	1	1	Paper	Open for bidding	1d 07h 35min 09s	9/30/2015 8:00:00 AM	10/1/2015 7:00:00 PM		n.a.	n.a.	
1 Result(s)												

Who can access?

At first, only the contacts selected as recipients when sending out the RFx may access it; however, these contacts can later add colleagues to the RFx team, allowing them to access and respond to the RFx (see p.11).

Accessing the RFx

You can access an RFx in one of 3 ways:

- Email invitation to participate: click the link provided in the email message.
- *Client Requests for Quote/Proposal* frame on home page: click the label of the RFx or its *Edit* icon to open it.
- Main navigation: select the menu *Bids & Auctions / Client Requests for Quote/Proposal* and click the label of the RFx or its *Edit* icon to open it.

Proposal progress status and action to be performed

The table below shows how the various proposal progress statuses and their associated visual cues indicate the actions you are expected to perform:

Action to be performed	Prop. progress status	Visual cue
Submit signed NDA	NDA to Send	
	Invalid NDA (please resend)	
Wait for NDA verification	NDA Being Validated	
Acknowledge receipt	Waiting acknowledgement	
Confirm intent to participate	Acknowledgement received	
Prepare response	Valid NDA	
	New	
	Intends to answer	
	In progress	
Submit response	Submitted	
(End of process)	Does not intend to answer	

Contents of an RFx folder

The request for quote/proposal folder includes the following tabs:

<i>Tab</i>	<i>Description</i>
View RFx	<p>This tab displays the RFx's general information, as well as an NDA section when this is required by the buyer.</p> <p>NDA (optional): When signing a confidentiality agreement is required by the buyer, you must provide this document before accessing the RFx. Follow the instructions given to send the document to the buyer (see also p.7).</p> <p>Acknowledgement (optional): When the buyer requires that you acknowledge receipt of the RFx, you must acknowledge receipt, and then, confirm or decline your participation in the RFx.</p>
Your proposal's Infos & Docs	<p>This tab together with the <i>Items</i> and <i>RFI response</i> tabs allow you to provide the requested elements in your answer.</p> <p>In this tab, you will more specifically provide basic information relating to your response, such as label, validity end date, and summary, as well as attachments.</p>
Items	This is where you can provide your quote for the specific materials or services listed.
RFI response	This is the buyer's questionnaire form that you must respond to as part of your proposal.
Discussions with buyer	This space can be used to communicate with the team in charge of the RFx (requests for clarification, for example). Your communications with the team in charge of the RFx are not visible to the other suppliers.
History	By default, the History tab lists the <i>In progress</i> and <i>Submitted</i> proposals from the current round. By adjusting the search filters, you can access all proposals created on all the rounds of the RFx.
Manage my Team	<p>When the buyer sends out the RFx, he selects one or more contacts from known contacts of your business. These are the contacts who are initially invited to participate in the RFx.</p> <p>Depending on your needs, the <i>Manage my team</i> tab allows the initially invited contacts to define a working team by adding/removing users.</p>

Before you reply

Downloading, signing, and submitting the NDA

When the buyer requires you to sign a Non-Disclosure Agreement, you must provide this document before accessing the RFx.

The screenshot displays the 'Sourcing process (extranet)' interface. At the top, there's a navigation bar with a search bar and a printer icon. Below it, a status bar indicates 'Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 05h 32min 43s' and a warning 'No proposal has been submitted'. The left sidebar contains a menu with options: 'View RFx' (highlighted), 'Your proposal's Infos & Docs', 'Items', 'RFI Response', 'Discussions with buyer', 'History', and 'Manage my Team'. The main content area is titled 'NDA' and contains the following text: 'Informations included in this RFx are confidential. You cannot access this RFx contents until you read and accept the following Non Disclosure Agreement, following these steps: 1) Download document template (with a link to 'Non Disclosure agreements templates (EN)'), 2) Please fill in the blanks, print it, sign it and then scan it. 3) Attach scan document'. Below this is a file upload area with a 'Click or Drag to add a file' button and a 'Submit to buyer' button. At the bottom, there's a section for 'RFx general infos' which lists: 'Business Process code : BPM000170', 'Label : Office Supplies', 'Lot# : 1', 'Round : 1', 'Begin date :', and 'Bid Due Date : 11/26/2015 10:30:00 PM (your local time)'. The footer of the interface reads 'Ivalua Buyer demo v8.146 ©'.

< ↺ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 05h 32min 43s ⚠ No proposal has been submitted

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

NDA

Informations included in this RFx are confidential.

You cannot access this RFx contents until you read and accept the following Non Disclosure Agreement, following these steps:

- 1) Download document template
 - [Non Disclosure agreements templates \(EN\)](#)
- 2) Please fill in the blanks, print it, sign it and then scan it.
- 3) Attach scan document

Click or Drag to add a file

Submit to buyer

RFx general infos ▾

Business Process code : BPM000170

Label : Office Supplies

Lot# : 1

Round : 1

Begin date :

Bid Due Date : 11/26/2015 10:30:00 PM (your local time)

Ivalua Buyer demo v8.146 ©

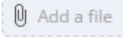
1. Click on the link *Non-Disclosure agreements templates*. Complete the downloaded document, print it, sign it, and scan it.

NDA

Download NDA →

Informations included in this RFx are confidential.
You cannot access this RFx contents until you read and accept the following Non Disclosure Agreement, following these steps:

- 1) Download document template
 - [Non Disclosure agreements templates \(EN\)](#)
- 2) Please fill in the blanks, print it, sign it and then scan it.
- 3) Attach scan document

 Add a file

Submit to buyer

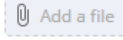
2. From your file explorer, drag the file attachment and drop it in the file drop zone. Alternatively, you can click the file drop zone and select the desired file attachment.

NDA

Drop or select signed NDA →

Informations included in this RFx are confidential.
You cannot access this RFx contents until you read and accept the following Non Disclosure Agreement, following these steps:

- 1) Download document template
 - [Non Disclosure agreements templates \(EN\)](#)
- 2) Please fill in the blanks, print it, sign it and then scan it.
- 3) Attach scan document

 Add a file

Submit to buyer

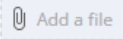
3. Click the **Submit to buyer** button.


NDA

Submit signed NDA →

Informations included in this RFx are confidential.
You cannot access this RFx contents until you read and accept the following Non Disclosure Agreement, following these steps:

- 1) Download document template
 - [Non Disclosure agreements templates \(EN\)](#)
- 2) Please fill in the blanks, print it, sign it and then scan it.
- 3) Attach scan document

 Add a file

 NDA.pdf

Submit to buyer

The buyer will be notified by email that your non-disclosure agreement is awaiting their verification. On your screen, a message will indicate so.

< ↺ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 05h 29min 30s ⚠ No proposal has been submitted

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

NDA

Non disclosure agreement submitted on 11/24/2015 5:00:06 PM. Pending validation.

RFx general infos ▾

Business Process code : BPM000170

Label : Office Supplies

Lot# : 1

Round : 1

Begin date :

Bid Due Date : 11/26/2015 10:30:00 PM (your local time)

Ivalua Buyer demo v8.146 ©

Once the agreement is verified, you will be notified by email. As you access the RFx, you'll see that the screen now indicates that the NDA has been verified and that you can now access the tabs that were unavailable until then.

< ↺ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 05h 25min 44s ⚠ No proposal has been submitted

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

NDA

Non disclosure agreement validated on 11/24/2015 5:02:16 PM.

RFx general infos ▾

Business Process code : BPM000170

Label : Office Supplies

Lot# : 1

Round : 1

Begin date :

Bid Due Date : 11/26/2015 10:30:00 PM (your local time)

Summary :

Process :

RFx documents ▾

Title	Type	Attachments	Author	End of validity	Version
General Terms & Conditions	RFX Commercial Documents (Approved)		ON AIR Admin		1
Purchasing Group Policy	RFX Commercial Documents (Approved)		ON AIR Admin		1

2 Result(s)

[Access to questionnaire](#)

[Access to quotation form](#)

Ivalua Buyer demo v8.146 ©

Download all contents related to this RFx ⓘ Save

In case of refusal, you are also notified via email. A message will give the reason for the refusal and will invite you to repeat the procedure. Send the document again taking into account the buyer's remarks, then wait for the verification of this new document.

Reviewing the RFx before acknowledging participation

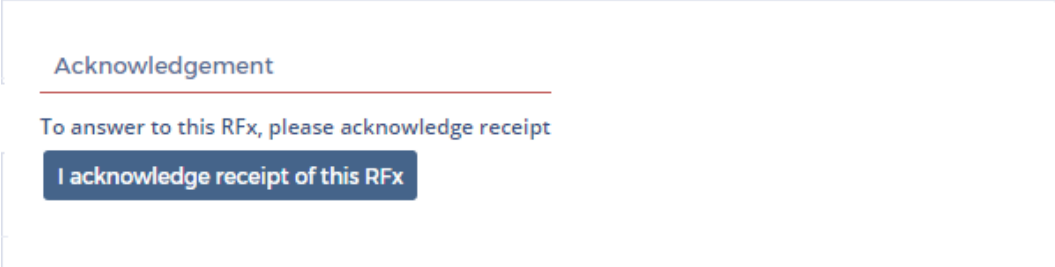
In the *View RFx* tab, review the *RFx General info* and *RFx documents* sections.

Review the *RFI Response* and *Items* tabs as well (if an NDA is required, these become available as soon as you have submitted the NDA and it has been approved).

If anything remains unclear, use the *Discussions with buyer* tab to ask for additional clarification (see p.13).

Acknowledging receipt and participation

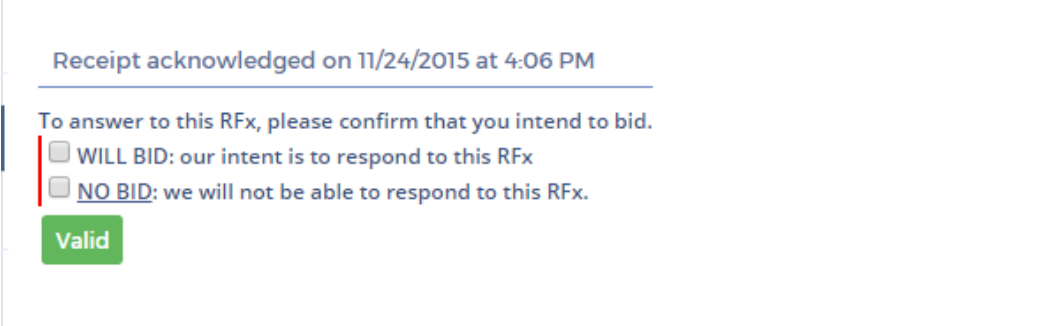
This action may be required or optional. When it is required, an *Acknowledgement* section is displayed on all tabs and you must complete this step before you can respond to the RFx.



The screenshot shows a section titled "Acknowledgement" with a red underline. Below the title, it says "To answer to this RFx, please acknowledge receipt". At the bottom of this section is a blue button with the text "I acknowledge receipt of this RFx".

Click the **I acknowledge receipt of this RFx** button. This will reveal a new set of options whereby you can express whether you intend to participate or not:

- Select the *WILL BID* option, if you think you will respond to the RFx.
- Select the *NO BID* option, if you think you will not respond to the RFx. When you click this option, an optional *Comments* field will allow you to indicate the reason(s) why you cannot participate to the RFx.



The screenshot shows the "Acknowledgement" section after clicking the button. It now displays "Receipt acknowledged on 11/24/2015 at 4:06 PM" with a blue underline. Below this, it says "To answer to this RFx, please confirm that you intend to bid." There are two radio button options: "WILL BID: our intent is to respond to this RFx" and "NO BID: we will not be able to respond to this RFx". At the bottom is a green button labeled "Valid".

Click the **Valid** button.

Giving access to the RFx to other users from your company

When setting up the RFx, the buyer selects one or more contacts in your Supplier sheet and chooses one “main” contact. At the launch of the RFx, all selected contacts will be notified and be granted access to the RFx.

The *Manage my team* step allows you to give access to the RFx to colleagues by adding them as contacts in this tab. You can:

- Add existing contacts (meaning contacts already declared in your supplier profile)
- Create new contacts (these will also be added to your supplier profile)
- Remove contacts, except the “main” contact, which cannot be deleted (if necessary, contact your buyer to modify the main contact)

< ⌚ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000166) : Lot 1 / Round 1 - Remaining time : 2d 10h 41min 45s ⚠ No proposal has been submitted

View RFx
Your proposal's Infos & Docs
Items
RFI Response
Discussions with buyer
History
Manage my Team

Unable to answer some questions of this RFx?
Get help from your colleagues!

Invite your colleagues and give them access to this RFx.
You can choose from the contacts already identified on this portal, or easily create a new contact to invite a colleague.

(NB: All selected contacts can modify and submit your answer. They will only have access to this RFx.)

Choose a contact :

or **Create a new contact** (may require a validation from our buyers for the account to be created)

Name	Email
JMBRUNEAU Contact	jmbRUNEAU@email.fr

1 Result(s)

Ivalua Buyer demo v8.146 © Download all contents related to this RFx Validate & Send my answer Cancel this answer Save

Selecting an existing contact

Simply choose the contact you want to add from the *Choose a contact* drop-down list (available only if there are existing contacts that can be added from your supplier profile).

Choose a contact :

Amanda Clark


Name	Email
CLARK Amanda	amanda.clark@email.com
MACMILLAN Casey	casey.macmillan@email.com




2 Result(s)

Creating a new contact

Click **Create a new contact** and complete the form that displays. Note that this new contact cannot log in to the application as is: login credentials need to be generated first (see below).




Generating login credentials for a contact

Should a contact you select or create have no login (meaning no user account enabling them to access the application), this will be indicated next to their name. Click the *Key* icon  to create the missing login: the contact will receive an email with the necessary login credentials and they will be granted access to the RFx.

	Name		Email
×	CLARK Amanda		amanda.clark@email.com
	MACMILLAN Casey		casey.macmillan@email.com
×	RODRIGUEZ Ramon (No login)		ramon.rodriquez@email.com
3 Result(s)			

Removing a contact from the RFx team

Notice that you can remove any contact except one (no Delete icon). This is the contact the buyer has identified as his main contact.

	Name		Email
×	CLARK Amanda		amanda.clark@email.com
	MACMILLAN Casey		casey.macmillan@email.com
×	RODRIGUEZ Ramon (No login)		ramon.rodriquez@email.com
3 Result(s)			

Discussions with buyer (clarifications, inquiries, etc.)

The *Discussions with buyer* tab allows you to exchange messages with the buyer who is in charge of the RFx. These messages remain confidential and are only visible by you and the buyer. Once sent, messages are logged in the list of exchanged messages.

Creating a message

1. In the RFx, display the *Discussions with buyer* tab.
2. To send a question or a message to the buyer, click on the **Compose** button.
A message creation area is displayed.

The screenshot shows the Ivalua Buyer demo interface. The top navigation bar includes the Ivalua logo and links for Client Relationship, RFx, Contracts & Pricing, and Orders. The user is logged in as 'Contact J.'. The main content area is titled 'Sourcing process (extranet)' and shows details for 'Office Supplies (BPM000170) : Lot 1 / Round 1'. A sidebar on the left contains navigation options: View RFx, Your proposal's Infos & Documents, Items, RFI Response, Discussions with buyer (highlighted with a red circle and the number 1), History, and Manage my Team. The main content area has a 'Compose or Search' dropdown menu. Below it, there is a 'Compose' button (highlighted with a red circle and the number 2) and a 'Search' button. A message list is shown below, indicating '0 Result(s)'. The 'Compose' form is open, showing fields for Type (set to 'Clarification'), From (set to 'JMBruneau Contact'), Title, and Recipient(s). A file upload area is also present. The 'Done' button is highlighted with a red circle and the number 4. The bottom of the interface shows a status bar with the text 'Ivalua Buyer demo v8.146 ©' and buttons for 'Download all contents related to this RFx', 'Validate & Send my answer', 'Cancel this answer', and 'Save'.

3. Fill in the fields:
 - Select the type of message (*Clarification*).
 - Select the recipient(s) of the message.
 - Enter a title for the message.
 - Enter the text of your message.
 - To add attachments to your message, select them in your file explorer and drop them in the file drop zone.
4. When your message is ready, click on the **Done** button. The message is sent to the selected recipients and saved in the message list.

Reading a message

Unread messages are highlighted in green.

Compose or Search ▾

Compose

Search

Message List - click on message title to see the full thread at the right

Title	Message	Update
Question	1 / 2	11/24/2015 5:54:30 PM

1 Result(s)

To read a message, click on it (the entire line is clickable). The thread and its messages are displayed.

< ↺ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 04h 32min 33s (⚠ No proposal has been submitted)

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

Compose or Search ▾

Compose

Search

Message List - click on message title to see the full thread at the right

Title	Message	Update
Question	1 / 2	11/24/2015 5:54:30 PM

1 Result(s)

Question Clarification

From: JMBruneau Contact 11/24/2015 5:50:46 PM(your local time)

At: Recipient(s) : Sourcing process - Owner

Hello,
I have a question relating to...
Best regards

Forward Reply to all Reply

From: A DE 11/24/2015 5:54:30 PM(your local time)

At: Recipient(s) : >>J.M. BRUNEAU-JMBRUNEAU Contact

Buyer's response

Forward Reply to all Reply

lvalua Buyer demo v8.146 ©

Download all contents related to this RFx Validate & Send my answer Cancel this answer Save

Replying to or forwarding a message

From: A DE 11/24/2015 5:54:30 PM(your local time)

At: Recipient(s) : >>J.M. BRUNEAU-JMBRUNEAU Contact

Buyer's response

Forward Reply to all Reply

Use the **Reply**, **Reply to All** and **Forward** buttons:

- To reply to the sender of the message, click on the **Reply** button.
- To reply to the sender of the message and to all recipients, click on the **Reply to All** button.
- To forward the message, click on the **Forward** button.

If you choose **Reply** or **Reply to All**, a new message creation zone appears under the received message.

Use this zone to write your answer (*Message*) and/or attach a file. Click on **Done** to send your reply.

This screenshot shows the 'Reply' message creation interface. At the top, a header bar displays 'From: A DE' on the left and '11/24/2015 5:54:30 PM(your local time)' on the right. Below this, a sub-header shows 'At: Recipient(s) : >>J.M. BRUNEAU-JMBRUNEAU Contact'. The main body of the form is a large text area labeled 'Buyer's response'. At the bottom right, there are 'Cancel' and 'Done' buttons.

If you choose **Forward**, the received message is displayed in edit mode.

By default, the sender of the message is defined as recipient. You can delete it (✕) and select one or more recipients. Click on **Done** to send the message.

This screenshot shows the 'Forward' message creation interface. It features a 'Type:' dropdown menu set to 'Clarification'. Below this, the 'From:' field is 'JMBruneau Contact'. The 'Title:' field contains 'Question'. The 'At: Recipient(s) :' field has a dropdown menu and a small '✕' icon to its left. Below the recipient field is a text area labeled 'Buyer's response'. At the bottom right, there are 'Cancel' and 'Done' buttons.

Preparing a response to an RFx

Creating a new response

1. In the RFx, display the tab *Your proposal's Infos & Docs*.

The screenshot shows the 'Sourcing process (extranet)' interface. On the left is a sidebar with navigation tabs: 'View RFx', 'Your proposal's Infos & Docs' (selected), 'Items', 'RFI Response', 'Discussions with buyer', 'History', and 'Manage my Team'. The main content area is titled 'Office Supplies (BPM000166) : Lot 1 / Round 1 - Remaining time : 2d 10h 19min 43s (⚠️ No proposal has been submitted)'. It contains a form with the following fields: 'Name : Proposal # 1', 'Validity end date :', and 'Proposal summary :'. Below these is a section for 'RFP Supplier Documents' with a dashed box indicating where to drop files and a 'Click or Drag to add files' prompt. At the bottom of the interface is a footer bar with the text 'Ivalua Buyer demo v8.146 ©' and four buttons: 'Download all contents related to this RFx', 'Validate & Send my answer', 'Cancel this answer', and 'Save'.

2. Give a name to your proposal.
3. Enter the proposal validity end date.
4. Enter a description in *Proposal Summary* field.
5. Click the **Save** button. Your proposal is now created.

You can now start entering information in the proposal:

- Quoting, page 17
- Adding attachments, page 19
- Responding to the buyer's questionnaire, page 20

You can also close the RFx at any time and re-open it later and resume completing it; just make sure you save any data you entered.

Other actions you may perform:

- Cancelling a response, page 20
- Viewing the responses' history, page 22

Quoting

You can directly enter your prices in the *Items* tab or upload an **MS Excel®** file instead.

Quoting directly in the displayed grid

1. In the RFx, display the *Items* tab.

< ↺ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 04h 19min 04s (⚠ No proposal has been submitted)

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

Download in Excel 2007-2010 format (xlsx)
Download in Excel 97-2003 format (xls)

Drop here your quotation form (in Excel format)
Click or Drag to add a file

Currency: USD Total: Total per currency

Keywords: Search Reset

Not answered items: 0

Grille de réponse


	Code	Type code	Item	Order	Date livr.	PU	Qté	Montant	Date livr.	Unité
+	I1_1	Required Item	Item A				500.00000			Each
+	I1_2	Required Item	Item B				400.00000			Each
+	I1_3	Required Item	Item C				600.00000			Each

3 Result(s)

Ivalua Buyer demo v8.146 © Download all contents related to this RFx Validate & Send my answer Cancel this answer Save

2. In the *Currency* drop down list, select the currency to use.
3. For each item, fill in the open fields.
There can be multiple response grids to address different types of items.
4. Click on the **Save** button. The total amount is calculated automatically.

Quoting in MS Excel®

1. In the RFx, display the *Items* tab.
2. Click on  *Download in Excel (2007-2010 or 97-2003) format* and open the downloaded file.

The Excel file includes several tabs (Excel sheets):

- Manual: contains instructions on how to use the file, we recommend you to read this tab carefully.
- Response grid: the file includes one tab per response grid.

	A	B	C	D	E	F	G	H	I	J
1	Code	Type code	Item	Order	Deliv. date	Unit price	Qty	Amount	Deliv. date_1	Unit
2	I1	Required Item	Item 1	1	10/16/2015	630	50	31500	5/5/2014	Each
3	I2	Required Item	Item 2	2	10/16/2015	50	100	5000	5/5/2014	Each

3. In each form (grid), fill in the blank fields.
4. Save the Excel file to a location of your choice.
5. Once the form is filled, upload it to IVALUA BUYER. To do this, select the file in your file explorer and drop it in the *Add a file* area in the upper right part of the *Items* tab.

[Sourcing process \(extranet\)](#)

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 04h 19min 04s (No proposal has been submitted)

View RFx

Your proposal's Infos & Docs



Items

RFI Response

Discussions with buyer

History

Manage my Team

 Download in Excel 2007-2010 format (xlsx)
  Download in Excel 97-2003 format (xls)

Drop here your quotation form (in Excel format)







Click or Drag to add a file

Currency : USD
 Total : Total per currency

Keywords :

Not answered items : ☐

Grille de réponse

	Code	Type code	Item	Order	Date livr.	PU	Qté	Montant	Date livr.	Unité
	I1_1	Required Item	Item A			<input type="text"/>	500.00000			Each
	I1_2	Required Item	Item B			<input type="text"/>	400.00000			Each
	I1_3	Required Item	Item C			<input type="text"/>	600.00000			Each

3 Result(s)

Download all contents related to this RFx

Validate & Send my answer

Cancel this answer

Save

Adding attachments

1. Open the RFx and display the *Your proposal's Infos & Docs* tab.

Sourcing process (extranet)

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 04h 09min 41s ⚠ No proposal has been submitted

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

Name : Proposal # 1

Validity end date :

Proposal summary :

RFP Supplier Documents

(Please drop your files here)

Click or Drag to add files

Document.pdf

Acknowledged on 11/24/2015 at 5:06 PM

Download all contents related to this RFx Validate & Send my answer Cancel this answer Save

2. From your file explorer, drag the file attachments and drop them in the file drop zone under the *RFP Supplier Documents* section. Alternatively, you can click the file drop zone and select the desired file attachments.
The attached documents are listed below the file drop zone.

Responding to the buyer's questionnaire

If the buyer has attached a questionnaire to the request for proposal, it will be available in the *RFI Response* tab.

You can respond to a questionnaire directly in the *RFI Response* tab via **MS Excel®** file.

Responding directly in the displayed form

1. In the RFx, display the *RFI Response* tab.

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 04h 07min 11s ⚠ No proposal has been submitted

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

Download in Excel 2007-2010 format (xlsx)

Download in Excel 97-2003 format (xls)

Drop here your RFI answer (in Excel format)

Click or Drag to add a file

Code	Question	Answer
[Q1]	Legal Name	<input type="text"/>
[Q2]	Enter Contact Information for this RFx	<input type="text"/>
[Q3]	Do you subcontract or outsource outside of the US?	<input type="radio"/> Yes <input type="radio"/> No
[Q4]	Are you currently one of our suppliers?	<input type="radio"/> Yes <input type="radio"/> No

4 Result(s)

<< Previous Next >>

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Download all contents related to this RFx ⓘ Validate & Send my answer Cancel this answer Save

2. Complete the questionnaire in the format requested (text, attachment, check boxes, drop-down list).
3. Click the **Save** button.

Responding in MS Excel®

Follow the same procedure as for filling in the quotation form via MS Excel® (see page 18), but by using *Download in Excel (2007-2010 or 97-2003) format* and then dropping the completed file on the dedicated drop zone.

Cancelling a response

1. Click on the **Cancel this answer** button. A message is displayed, inviting you to confirm your request.
2. Click on the **OK** button. The response is now canceled.

Submitting your response to the buyer

Validating and submitting a response to the buyer

Once your answer is finalized (quotation form is filled, questionnaire is completed, and files are attached), you can submit your proposal to the buyer.

1. Click on the **Validate &Send my answer** button.

A message is displayed. It presents an overview of completed items.

Do you really want to submit your proposal?

Once an offer is submitted, it cannot be modified. You will only be able to create a new one.

- 3 / 3 items have been filled.
- 7 / 7 questions have been filled.
- 1 document(s) have been attached to the proposal.

Submit my proposal

Cancel

Review these elements before submitting your response, since a submitted response is no longer editable.

2. Click on the **Submit my proposal** button.

A message confirms that your proposal has been taken into account:

Your proposal has been successfully submitted.Buyers have been no...

You can follow your bid status in next step "History of Submitted Bids"

Bid Submitted on 10/2/2015 2:40:26 PM

Viewing the responses' history

Each RFx folder includes a *History* tab. All the responses created under this folder are logged in the *History* tab, regardless of their status. By default, only proposals from the current round with an *In progress* or *Submitted* status are displayed. By adjusting the search filters, you can access all proposals created on all the rounds of the RFx.

The *History* tab allows you to track your bid's status.

< ⌂ ☆ Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 1 - Remaining time : 2d 03h 57min 01s

View RFx

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

Round / Lot : Status :

✖ Office Supplies 1 ✖ In progress ✖ Submitted

Round	Label	Status	Bid progress	Quest. progress	Submission date	Total amount	Created by
Office Supplies - 1	Proposal # 1	Submitted	3/3 (100%)	7/7 (100%)	11/24/2015 6:31:37 PM	60,400.00 USD	JMBRUNEAU Contact

1 Result(s)

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To consult a response from the History, click on its label.

Buyer's acknowledgment of receipt

When creating the RFx, the buyer may have planned to acknowledge receipt of your answer. When this is the case, the message that is displayed during the submission of your response will say so.

In the History tab, your answer is marked as *Pending acknowledgment*.

Round	Label	Status	Bid progress	Quest. progress	Submission date	Total amount	Created by	Buyer ACK
Office Supplies - 2	Proposal # 1	Submitted	3/3 (100%)	7/7 (100%)	11/25/2015 11:04:20 AM	64,400.00 USD	JMBRUNEAU Contact	Pending acknowledgment
1 Result(s)								

When the buyer has acknowledged receipt of your reply, this information will be updated:

Round	Label	Status	Bid progress	Quest. progress	Submission date	Total amount	Created by	Buyer ACK
Office Supplies - 2	Proposal # 1	Submitted	3/3 (100%)	7/7 (100%)	11/25/2015 11:04:20 AM	64,400.00 USD	JMBRUNEAU Contact	<input checked="" type="checkbox"/>
1 Result(s)								

Submitting a different response or replacing a validated response

You can submit multiple responses on the same lot/round. If you want to create a new response when you already have validated at least one response, you must specify whether the new response is a new alternative to existing proposals or if it replaces a response.

1. Open your proposal and display the *Your proposal's Infos & Docs* tab.
2. Click on the **Create a new response** button.
3. In *Response type*, specify if it is an alternative answer to existing responses or if it replaces an earlier response (specify what response from the drop down list).

< ⌂ ☆ | Sourcing process (extranet) Search ...

Office Supplies (BPM000170) : Lot 1 / Round 2 - Remaining time : 1d 11h 20min 23s (⚠ Current proposal has not been submitted)

View RFX

Your proposal's Infos & Docs

Items

RFI Response

Discussions with buyer

History

Manage my Team

Name : Proposal # 2

Answer type : ☒ Alternate proposal ☐ Replace existing proposal

Validity end date :

Proposal summary :

RFP Supplier Documents

(Please drop your files here)

Click or Drag to add files

Acknowledged on 11/25/2015 at 11:00 AM

Download all contents related to this RFX Recover my last offer Duplicate a previous bid Validate & Send my answer Cancel this answer Save

4. Complete your response as described in the section *Preparing a response to an RFX*, page 16; you can also duplicate a previous response, this helps you input everything again when you simply wish to change certain elements of your response (see *Creating a new response based on a previous*, page 24).
5. Click on the **Save** button.

Creating a new response based on a previous one

You can create a new response by duplicating a previous response (submitted responses only).

During duplication, all data are included: general information, quotation form (filled), questionnaire answers and attachments. The data can then be modified.

To duplicate your last submitted bid, click the **Recover my last offer** button.

To duplicate any bid:

1. Click the **Duplicate a previous bid** button.

The *List of proposals* window is displayed. It provides a list of responses that you can duplicate. By default, the list is filtered to show submitted responses of the current round; you can change filters to show responses from other rounds and responses in other statuses. You can view these responses by clicking their label.

List of proposals

Round / Lot :
Status :

Search
 Reset

Duplicate	Round	Label	Status	Bid progress	Quest. progress		Submission date	Total amount	Created by	Buyer ACK
	Office Supplies - 2	Proposal #1	Submitted	3/3 (100%)	7/7 (100%)		11/25/2015 11:04:20 AM	64,400.00 USD	JMBRUNEAU Contact	<input checked="" type="checkbox"/>

1 Result(s)

Close

2. Select the response to duplicate by clicking its icon . A message is displayed, inviting you to confirm your request.
3. Click on the **OK** button.
A new response is created, containing the copied response elements.
4. Make the changes you wish.
5. Click on the **Save** button.

List of Client Requests for Quotes/Proposals

Accessing Requests for proposals

In IVALUA BUYER, you can access an RFx that is sent to you by selecting the *Bids & Auctions / Client Requests for Quote/Proposal* menu item. The *Client Requests for Quote/Proposal* page is displayed.

Becoming familiar with the interface

The *Client Requests for Quote/Proposal* page presents the list of RFx to which you are invited to respond.

Prop. progress	Sourcing process	Lot#	Round#	Round	RFx status	Remaining time	Begin	End	My bid	My rank	Best bid	Forum
Submitted	BPM000170	1	2	Office Supplies	Open for bidding	1d 11h 17min 51s		11/26/2015 10:30:00 PM	64,400.00 USD	n.a.	n.a.	
In progress	BPM000166	1	1	Office Supplies	Open for bidding	1d 11h 17min 50s	11/16/2015 9:00:00 AM	11/26/2015 10:30:00 PM		n.a.	n.a.	
NDA to send	BPM000108	1	1	Req. 6/3/2014	Open for bidding	Bid due date has passed	6/3/2014 3:13:36 PM	6/4/2014 12:00:00 AM	1,500.00 USD	n.a.	n.a.	
New	BPM000100	1	3	Office Furniture	Open for bidding	Bid due date has passed		4/30/2014 12:00:00 AM		n.a.	n.a.	
NDA to send	BPM000091	1	1	Papier A4	Open for bidding	Bid due date has passed	2/20/2014 1:00:00 AM	3/10/2014 12:00:00 AM		n.a.	n.a.	
In progress	BPM000011	1	1	Consultation Bureau	Open for bidding	Bid due date has passed	9/19/2011 2:00:00 AM	2/29/2012 1:00:00 AM	41,000.00 EUR	n.a.	n.a.	


6 Result(s)

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By default, the list displays the RFx that are open for bidding, i.e. those for which you can submit a response. You can modify this display criterion by editing the selected option in the *Status* list, then by clicking on the **Search** button (the non-selection of an option in this list allows you to display all the requests, regardless of their status).

The list of Requests provides the following information:

Column	Description
	Opens the RFx round
Prop. progress	Status of your last response
Sourcing process	Sourcing process code
Lot #	Lot number
Round #	Round number
Round	Round name
	If the buyer has filled in a more detailed description, the icon will appear next to the round name; roll over this icon to display the description.

Column	Description
RFx status	RFx Status (Approval, Open for bidding, Achieved, Proposals available)
Remaining time	Time left before the bidding period closes
Begin/End	Dates of beginning and end of RFx specified by the buyer
My bid	Your last bid's amount
My rank	Your rank among the suppliers who were invited to bid
Best bid	Best bid among the bids of all the suppliers who were invited to bid
Forum 	Direct access to the message board dedicated to the RFx

Searching an RFx

The upper part of the *Inbox - requests* window has multiple search filters that allow you to easily find a given RFx or a set of RFx that meet specific criteria.

1. Define your search criteria. You can filter the list on several criteria:
 - *Keywords*: enter a string of characters to search.
 - *Prop. progress*: allows you to display the RFx depending on the progress status of the answers that you have created.
 - *Status*: select a status to display only the RFx that have this status.
2. When you're done, click on **Search** to launch the search. The corresponding RFx are displayed in the list of RFx.

To cancel the filters that you have selected and display the default list again, click on **Reset**.